



New end-user terminals: Market drivers

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NOKIA

Contents

- Mobile multimedia
 - The vision
 - Market trends and drivers
 - Latest in end-user terminals
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- Mobile life extensions
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- Home solutions key drivers
 - Consume
 - Share
 - Store

In Nokia's vision

Life goes mobile!

NOKIA

Life Goes Mobile – even in the Home

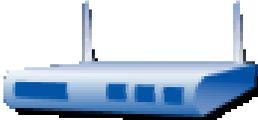


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Digital Home Vision

BROADBAND

Entertainment,
E-Business, Services



**Consumers want their
devices to work together
and share content**

MOBILE MULTIMEDIA

Entertainment,
Personal Pictures and Video,
Services



MEDIA

Pre-Recorded Content
Personal Media



BROADCAST

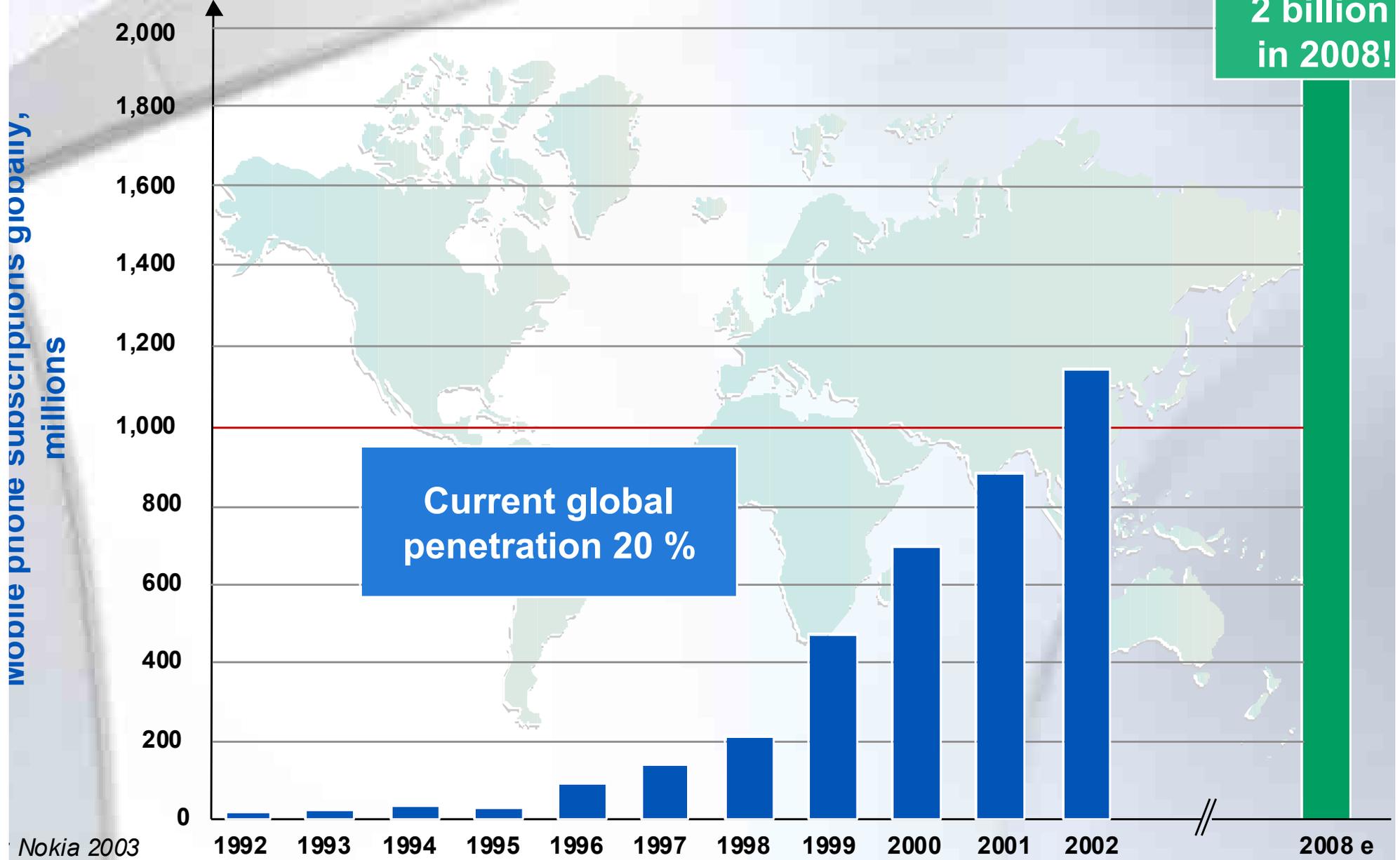
Services,
Entertainment



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Towards the 2 Billion Milestone



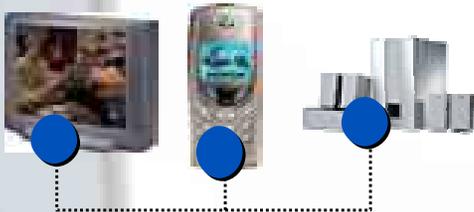
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Mobile device trends



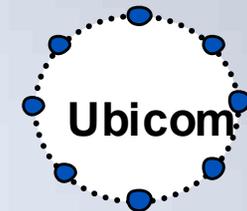
Takes the role as the preferred **centerpiece for personal content**

Interacts with **multiple devices** creating added value



Utilises **PC and fixed-line Internet** for complementary purposes

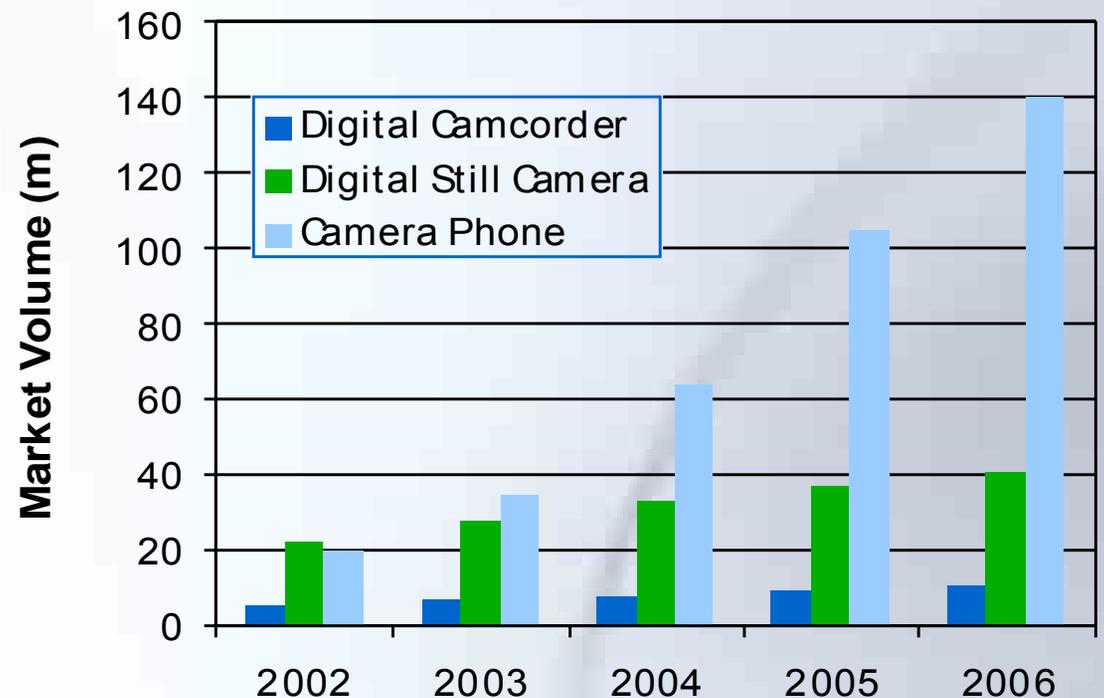
Performs multiple tasks as a **life management and enrichment tool**



Camera phones outnumbered the sales of digital still cameras

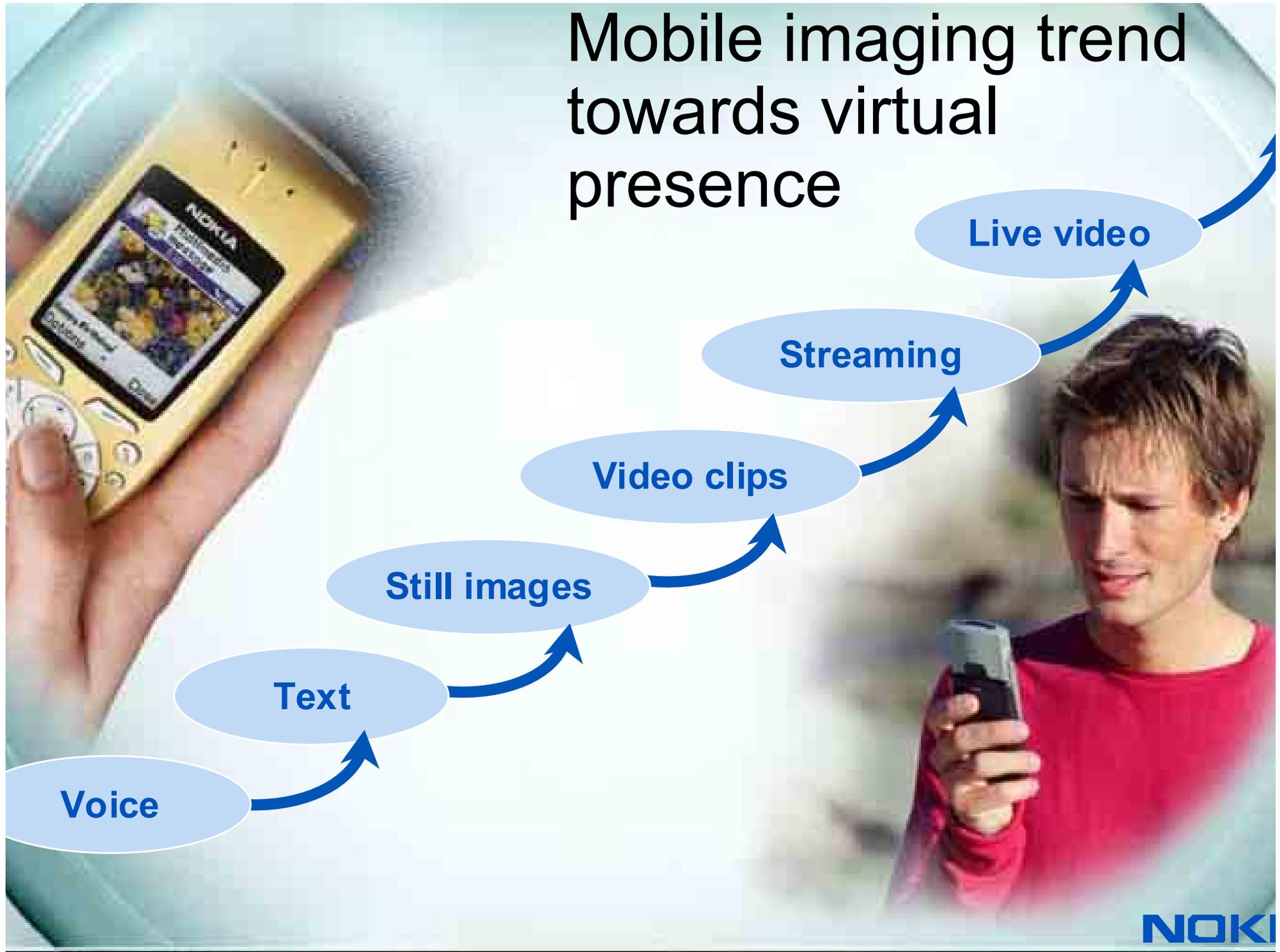
- Camera phone volumes passed digital still camera market volumes in H1'03

Global Market Volume

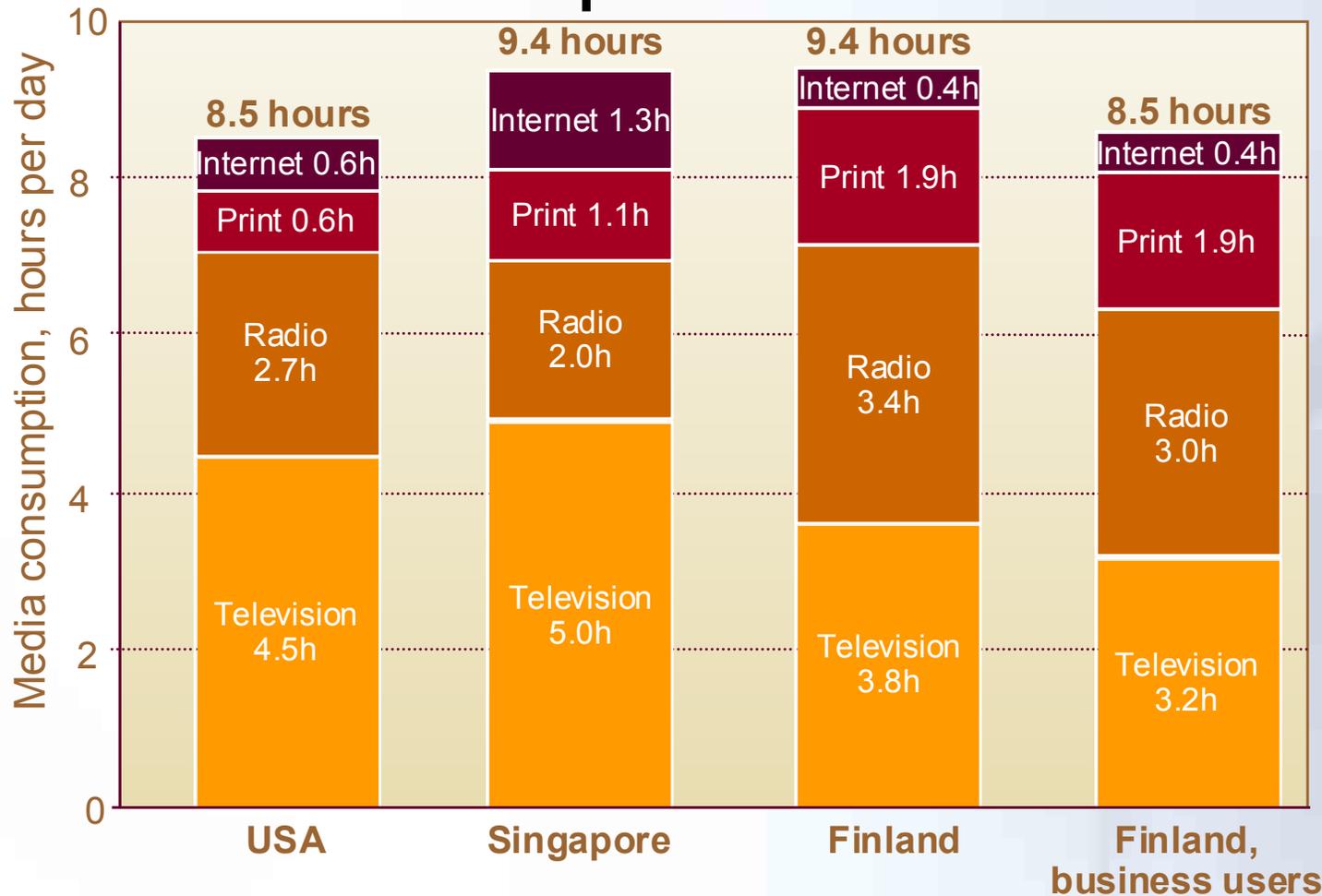


Sources: IDC Worldwide Digital Camcorder Forecast & Analysis 2002-2006 (August 2002)
IDC Focusing Inside the Camera: Worldwide Digital Still Camera Technology Forecast and Analysis, 2002-2006 (May 2002)
IDC Moving Pictures: The Future of Mobile Devices and Imaging (August 2002) & IDC Analyst Query 22/4/03
Strategy Analytics, 2003

Mobile imaging trend towards virtual presence



As a service, mobile phone TV has great potential!



Source: Mediacom 2002, OMD Research 2001, Suomen Gallup 2002

A man with a beard and brown hair is shown in profile, looking down at a mobile phone he is holding in his right hand. The phone's screen displays a video of a person surfing on a wave. The background is a blurred indoor setting.

Service convergence case

1:

TV-like Services Go

IP Datacast technology brings TV to the Mobile!

- Digital television networks + IP elements enable broadcasting of TV-like content
- Cellular networks used for interactivity
- Optimized for mobile use

Broadcast complements one-to-one services

Cellular Service Provider



IP Datacast Service Provider

2G/3G cellular system
On demand
One-to-One

Broadcast system
Scheduled delivery
One-to-many



End user experience